

CITY OF PALM DESERT STAFF REPORT

MEETING DATE: June 12, 2025

PREPARED BY: Anthony J. Mejia, City Clerk

SUBJECT: 2025 STRATEGIC PLANNING AND NATIONAL COMMUNITY SURVEY

RECOMMENDATION:

1. Award a Professional Services Agreement to Berry, Dunn, McNeil & Parker, LLC, for Strategic Planning Services in the amount of \$128,900, plus \$12,890 in contingency.
2. Authorize the City Manager to finalize negotiations with Polco to facilitate the conduct of the National Community Survey in the amount of \$25,000.
3. Authorize the City Attorney to make necessary nonmonetary changes to the agreements.
4. Authorize the City Manager to execute agreements, amendments, change orders, and any other documents necessary to effectuate this action.

BACKGROUND:

On February 27, 2014, the City Council adopted *Envision Palm Desert – Forward Together*, the City's fourth Strategic Plan since incorporation in 1973. While the plan was intended to guide long-term priorities, only one formal progress report was completed—in 2016—and no further updates have been issued. Although staff has continued to align current programs and initiatives with the 2014 Plan, it is now widely recognized as outdated.

Since the adoption of the 2014 Strategic Plan, the City has undergone significant changes that merit a renewed strategic framework. Palm Desert is now a city with five Councilmember districts, Measure G has recently passed, the City has assumed direct operation of the Library following the dissolution of its County partnership, and it continues to navigate the post-redevelopment era. These changes, along with the natural evolution of community needs and priorities, present an ideal opportunity to conduct a temperature check with the City Council and refine the City's long-term vision. A new Strategic Plan will help affirm, remove, or reshape legacy goals to ensure alignment with current operations and future aspirations.

In light of these factors, staff initiated the release of a Request for Proposals (RFP) to develop a new Strategic Plan, setting a 10-year planning horizon with a formal update at the five-year mark. This approach is intended to ensure continuity, accountability, and flexibility in aligning strategic priorities with evolving leadership, technological, and community needs.

ANALYSIS:

To support the development of a new Strategic Plan, the City issued Request for Proposals (RFP) No. 2024-09, titled *Strategic Planning Services*, on February 10, 2025. The City sought qualified firms with demonstrated experience in strategic planning, public engagement, and performance measurement. The scope of work outlined in the RFP called for a comprehensive, collaborative process involving City leadership, staff, community stakeholders, and the public.

Key objectives included identifying long-term priorities, developing clear goals and implementation strategies, and establishing measurable outcomes to track progress over time.

A total of 16 proposals were received by the March 3, 2025, deadline in response to RFP No. 2024-09, Strategic Planning Services. The proposals reflected a wide range of firms with demonstrated experience in strategic planning and organizational development. A multi-departmental evaluation panel conducted a preliminary review based on the evaluation criteria outlined in the RFP, including qualifications, methodology, relevant experience, and cost. Following this initial review, the panel identified the top four proposals and invited those firms to participate in interviews, which were conducted on Friday, May 23, 2025.

The four firms selected for interviews were Berry Dunn, CV Strategies, Jacob Green & Associates, and Moss Adams. These firms were invited to present their approach, project team, and stakeholder engagement strategy to the evaluation panel during interviews. The interviews allowed the panel to explore each firm's ability to design and deliver a strategic planning process that reflects Palm Desert's evolving needs and priorities.

Following the interviews, Berry Dunn was identified as the top-ranked firm. Their team includes a group of professionally credentialed facilitators with deep experience in organizational development and public sector planning. Of particular note is their recent facilitation of the City of Indio's Strategic Plan and their ongoing consulting work with the Coachella Valley Water District (CVWD) and the Coachella Valley Association of Governments (CVAG) on enterprise resource planning (ERP) systems. Their proposal demonstrated a clear, outcomes-oriented methodology, strong familiarity with the Coachella Valley region, and a commitment to providing measurable, implementable results. The evaluation panel unanimously recommends awarding the contract to Berry Dunn.

PROPOSED SCOPE OF WORK

Berry Dunn's proposal includes a structured, six-phase process designed to deliver a clear, actionable Strategic Plan aligned with the City's vision, values, and operational goals. The proposed scope of work includes the following components:

1. Project Initiation and Planning

- Conduct project kickoff meeting
- Finalize work plan and schedule
- Establish communication protocols and key milestones

2. Document Review and Discovery

- Review foundational documents (e.g., prior strategic plans, budget documents, General Plan elements)
- Identify existing vision/mission, priorities, and performance frameworks

3. Stakeholder Engagement

- Conduct interviews with Councilmembers, City Manager, and Department Directors
- Facilitate staff workshops

- Design and conduct community engagement activities, including public forums or surveys (as determined by the City)

4. Strategic Plan Development

- Facilitate working sessions to define vision, mission, strategic priorities, and desired outcomes
- Develop strategic goals and corresponding initiatives
- Identify performance measures and success indicators

5. Review and Finalization

- Present draft Strategic Plan for review and feedback
- Refine content based on input from Council and executive team
- Prepare final Strategic Plan document

6. Implementation Support

- Deliver an implementation framework, including action planning tools and performance tracking templates
- Conduct staff training or workshops as needed to support rollout

While previous strategic planning efforts have utilized Steering Committees, staff does not recommend forming one for this initiative. Steering Committees can often prolong the planning process and introduce challenges related to group dynamics, competing agendas, or disproportionate influence over the final outcomes. Instead, staff recommends utilizing a more inclusive and statistically reliable approach to community engagement, such as the National Community Survey (NCS).

COMMUNITY INPUT THROUGH THE NATIONAL COMMUNITY SURVEY (NCS)

To ensure broad and representative community input, staff recommends the use of the National Community Survey (NCS), administered by Polco, as an alternative to the traditional Steering Committee model. The NCS is a nationally recognized survey tool specifically designed for local governments. It provides statistically valid results through a randomized, demographically representative sample of residents and includes an open participation version for wider community engagement.

The NCS offers an inclusive, efficient, and data-driven method of engagement. The survey captures resident perceptions across ten key facets of community livability, including safety, mobility, economic health, natural environment, and governance. Its methodology ensures that feedback reflects the broader community, not just those most vocal or involved. A sample NCS report is provided in Attachment 3.

A key advantage of the NCS is its benchmarking capability. The City's results will be compared to national and regional datasets, enabling Palm Desert to assess performance in context and identify opportunities for improvement. These benchmarks can provide meaningful insights that help the City prioritize initiatives and measure progress over time.

By engaging in the NCS, the City creates a foundation for data-informed priorities and decision-making. The survey results will help shape strategic goals that are responsive to resident input and backed by statistically reliable data. To maintain alignment with future planning cycles, staff recommends conducting the NCS every five years, just prior to each Strategic Plan update. This timing ensures that each plan is rooted in current community feedback.

Legal Review:

This report has been reviewed by the City Attorney's Office.

FINANCIAL IMPACT:

Berry Dunn's proposed cost for the Strategic Plan project is \$119,400, which includes all core services outlined in their scope of work, plus an additional \$9,500 for travel expenses for a total of \$128,900. Staff recommends allocating an additional \$12,890 (10%) in contingency in the event that the City desires to expand community engagement efforts or seek additional implementation tools.

Should the City Council choose to proceed with the National Community Survey (NCS) as part of the engagement strategy, the estimated cost is \$25,000 for a single implementation. This includes a statistically valid survey mailed to a randomized sample of households, Spanish translation, and access to an open participation version.

Funding for the Strategic Plan and National Community Survey has been identified in the FY 2024-25 budget, General Services Account 1104159-4309300, Prof-Other Admin. There is no additional impact to the General Fund with this action.

ATTACHMENTS:

1. Professional Services Agreement
2. Berry Dun Proposal
3. Sample NCS Report, City of Palm Springs 2021